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APRIL 29, 1988

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R&I EXCLUSIVE

A MARKETING BATTLEGROUND

By Susie Stephenson

■ INSTITUTIONAL GIANTS

Institutional foodservice directors and dietitians have become masterful promoters as they vie for customers' dollars.

The numbers are staggering: About 40% of total foodservice purchases each year are made by the institutional market. The dollar amount is close to $32.9 billion and is expected to increase almost 1% during 1988.

The people consuming this food range from inmates doing time in federal prisons to executives of the nation's most prestigious companies dining on seven-course banquets prepared by Culinary Institute of America chefs.

But the institutional segment is in flux. No longer is it a "guaranteed" market. Customers are choosier than in years past, more sophisticated and more demanding. As a result, foodservice directors and dietitians are becoming more aggressive in their pursuit of customers and their dollars.

What exactly has been going on?

"Our first graders today have more eating experience than high schoolers in the '50s," says Beverly Lowe, foodservice director of the Hampton, Va., schools.

Myriad other changes have taken place, as well. For instance, there are more working women. Today, 52.7 million women are in the work force, 7 million more than in 1980. For them, convenience is critical.

Also, the influx of immigrants is bringing new culinary expectations. It is estimated that by the year 2000, Asians will generate $115 billion in annual income; Hispanics will generate $242 billion. (These numbers will be up from an estimated $61 billion and $138 billion, respectively, in 1990.) Little wonder then that Jane Boehrer, foodservice director of the San Diego public schools, has added meat dishes on rice to appeal to her increasingly large Oriental population. Or that Beverly Greenburg, of the New York City schools, finds a Jamaican-style beef patty particularly popular among New York City school students.

Other changing demographics will continue to alter the makeup of institutional customers and institutional foodservice markets. For some segments, populations will decrease; there will be fewer economies of scale. For instance, in the 10 years from 1990 to 2000, the number of preschoolers is expected to decrease 1.6%. By the year 2000, there will be 30 million people between the ages of 65 to 84.

Fewer people are exercising than in years past, according to research, and many are less concerned with additives in their food (note the popularity of sugar substitutes). However, fat and cholesterol intake is causing anxiety among customers—and often influencing their menu selections.

Institutional foodservice directors and dietitians are capitalizing on this interest in healthful eating by moving away from passive nutrition education —table tents and posted calorie counts, for example—toward nutrition games in which customers can participate.

Customers are also increasingly concerned that their food is fresh, and, in many instances, they want to participate in the preparation of their meal. Self-service remains popular (it is also less labor-intensive, in most instances), as do products baked on premises. At the University of Wisconsin in Madison, for example, Foodservice Director Rheta McCutchin went through more than seven tons of bake-off cookie dough last year.

&RESTAURANTS INSTITUTIONS

The institutional giants have also faced up to the reality that not only are their customers more selective about what they want to eat, these same customers are quite likely to opt to eat someplace else (or bring meals packed at home) if institutional offerings don't appeal to their palates. And that option now exists.

For instance, rare is the university campus not edged with a variety of restaurants catering to students.

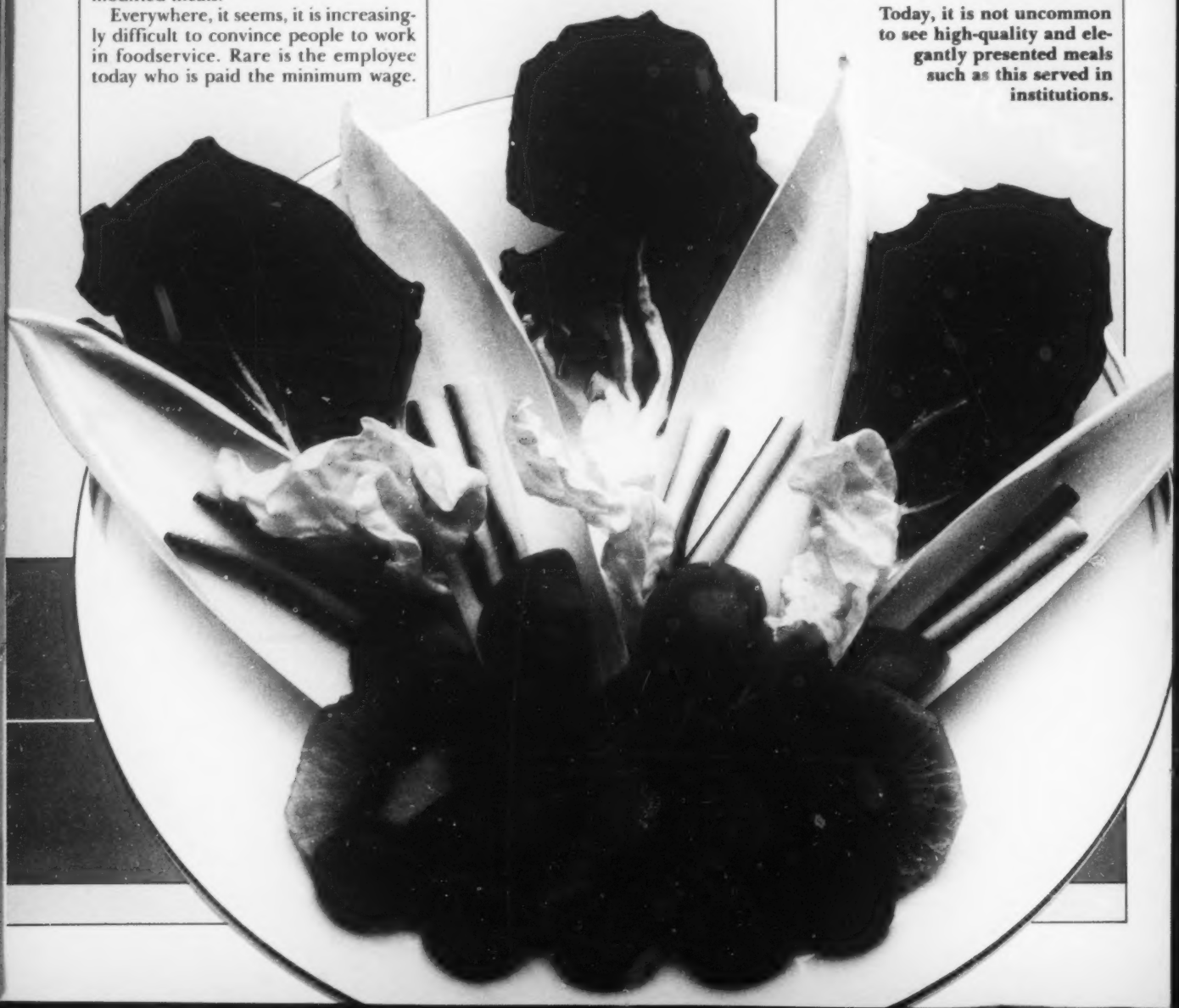
DRGs—the government-mandated health-care payment system—have created havoc with virtually every health-care foodservice department. Many have branched into revenue-producing markets such as catering and frozen modified meals.

Everywhere, it seems, it is increasingly difficult to convince people to work in foodservice. Rare is the employee today who is paid the minimum wage. As a result, prices are rising to offset higher wages, hours of service are being cut and vending machines are springing up everywhere—whether owned and operated by the institution or by vending companies.

All this competition for customers' dollars has resulted in far more sophisticated marketing and promotion programs. "Twenty years ago, we expected kids to eat with us, and they did," comments one college foodservice director. "Today, they are bombarded with advertisements—all trying to encourage them to eat someplace other than with us. As a result, we've upgraded our offerings and marketing programs. Our 'world' is getting very competitive. At the same time, most administrators are expecting more from us in terms of contributions to the bottom line. Oh, we'll never compete with McDonald's Mac Tonight commercial—we don't have those kinds of bucks—but you sure don't see any photocopied menus anymore, either."

On the following pages, we provide some insight into this market by describing major players and giving examples of what they're doing to increase their market share and participation in an increasingly competitive environment. (All figures given are for 1987 unless otherwise noted.)

Today, it is not uncommon to see high-quality and elegantly presented meals such as this served in institutions.



INSTITUTIONAL GIANTS

1 **MARRIOTT CORP. (foodservice management division)**
Washington, D.C.
F&B purchases in 1986:
$1,118 million*
No. of meals served/day:
2.5 million
No. of units: 2,200
No. of employees: 68,000

New menu items introduced in 1987 included Mexican meat loaf; low-calorie cheesecake.

2 **ARA SERVICES**
Philadelphia, Pa.
F&B purchases in 1986:
$1,050 million*
No. of accounts: 1,875

New menu items introduced in 1987 included executive box lunch program to Classic Fare (ARA's national, off-premises retail catering company); "light and right" frozen meals.

3 **CANTEEN CO.**
Chicago, Ill.
F&B purchases: $950 million
No. of accounts: 2,700
No. of employees: 25,000

New menu items introduced in 1987 included national rollout of two signature items: Bigger, Better Biscuits and Pizzelli's Pizza.

4 **SERVICE AMERICA CORP.**
Stamford, Conn.
F&B purchases: $400 million
No. of units: 10,000 (includes dining services, recreational services and vending)
Labor costs: $250 million

New menu items introduced in 1987 included pasta items, fish and chicken nuggets with sauces in schools, Sacwich deli sandwiches, such as roast beef.

5 **MORRISON'S CUSTOM MANAGEMENT**
Kingston, Pa.
F&B purchases: $140 million
No. of meals served: 200 million
No. of units: 697
Labor costs: $107 million

New menu items introduced in 1987 included sautéed chicken with wine sauce; steamed fish with summer vegetables.

CONTRACTORS

Contract companies such as Restaura provide 80% of the foodservice in business and industry.

Eight years ago, contract companies had a 25% share of the institutional segment sales; just five years later, in 1985, the share had increased to 38%. Although contract companies serve every segment of the industry—from airlines to amusement parks, schools, colleges and health care—one of their largest markets is business and industry feeding. According to the Society for Foodservice Management, contract companies provide foodservice to 80% of this segment. In-plant/in-office food purchases last year totaled about $7 billion, or 21% of the total institutional foodservice purchases. Purchases are estimated to increase about 1.5% this year.

Contract company executives see their biggest challenges as: recruiting talented employees; dealing with competition from grocery stores; containing costs (not many operations are subsidized anymore) and figuring out what customers really want.

In response to an increasing number of women in the work force, more business and industry operations are worrying about providing some kind of day-care service and also preparing meals that parents can take home.

Seasonal promotions called "The Times" was one of the most successful marketing ventures undertaken by Trusthouse Forte Foodservices last year. Divided into four groups—Winter Works, Spring Thymes, Summer Spells and Autumn Views—the company offered such special events as The Caribbean Cruise, Surfside Station and The Pumpkin Patch. Appropriate menu signs, promotions and recipes were part of the package available to clients.

Seiler Corp. offered a visiting chef program to many of its units. In conjunction with chefs from local restaurants, individual foodservice directors developed menu items (based on the restaurants' offerings) that were served to client-customers. In most instances, dining areas were decorated to look as similar to the restaurant as possible. Chefs, who directed the operation of the institutional kitchen for the event, also taught staff employees various new cooking techniques, such as how to use mandolins properly.

In 60 of Restaura's Division II accounts, a six-week Starcruise promotion was held in conjunction with Premier Cruise lines, a subsidiary of Greyhound (Restaura's parent company). Prizes (including luggage, solar calculators, watches and message microphones) were given away each week; the grand prize was a three-night Bahamian cruise. On opening day, cafeterias were decorated in a cruise-line ambiance and Restaura staff dressed in appropriate clothing. A special cruise-line meal was served. Participation increased as much as 20%.

dāka Inc. also saw an increase of as much as 20% in its accounts during an "Apple Sensation" promotion held last year. The venture stressed back-to-basics cooking and emphasized health and nutrition.

At the Wood Co., impulse sales of scratch products (rather than prepackaged snacks) increased when the company offered its Almost-Famous Cookies, three different, 5-inch home-style cookies that were merchandised in old-fashioned cookie jars.

To attract customers, special events often are offered by contractors in B&I accounts.

6 THE SEILER CORP.

Waltham, Mass.
F&B purchases: $80 million**
No. of foodservice accounts: 350
No. of employees (full-time equivalent): 4,600

New menu items added in 1987 included cuisine-to-go (takeout concept): tortellini salad; St. Moritz sandwich; fruit-filled chocolate "tacos" (waffles).

7 dāka

Wakefield, Mass.
F&B purchases: $68.6 million
No. of units: 372
No. of employees: 7,000
Labor costs: $81.8 million

New menu items added in 1987 included pasta perfect calzone; nonfat yogurt; petite gourmet vegetables; Cajun pizza; gourmet pizza.

8 RESTAURA DINING SERVICES

Phoenix, Ariz.
F&B purchases: $50 million
No. of transactions in 1987: 300 million
No. of units: more than 300
No. of employees: 7,000

New menu items introduced in 1987 included chicken breast with tarragon; beef broccoli stir-fry; roast pork Dijon.

9 TRUSTHOUSE FORTE FOODSERVICES

Trumbull, Conn.
F&B purchases: $45 million
No. of meals served: 15 million (plus 15 million other transactions, such as breakfast)
No. of units: 224 foodservice; 97 vending; 50 office coffee
No. of employees: 2,150 full-time; 320 part-time
Labor costs: $35 million

10 THE WOOD CO.

(privately owned subsidiary of Abela Enterprises, London)
Allentown, Pa.
F&B purchases: $43 million
No. of meals served: 45.3 million
No. of units: 204
Labor costs: $46 million

New menu items in 1987 included signature sandwiches.

OTHER BIG PLAYERS

☐ **Valley Food Service**
Jackson, Miss.
F&B purchases: $14 million
Number of meals served: 29.2 million

☐ **3M (independent)**
St. Paul, Minn.
F&B purchases: $1.9 million
Meals served: 1.5 million

☐ **Total Food Service Direction Inc.**
Coral Gables, Fla.
F&B purchases: $4.5 million
Number of units: 28

☐ **Pickett Food Service**
Shrevesport, La.
F&B purchases: $5.4 million
Number of units: 20

"The drop in beef consumption has bottomed out. But seafood, which is not well-marketed now, will increase in popularity."

—Bill Griffin
Morrison's Custom Management

*IFMA's Directory of Foodservice Opportunity Markets, Oct. 1987. **estimated by R&I

INSTITUTIONAL GIANTS

HEALTH CARE

Health care accounts for 21% of food purchases in institutions, but the number is expected to decrease.

The health-care market is still reeling from the impact of DRGs. Although the major players—National Medical Enterprises, Humana, Hospital Corp. of America and American Medical International Inc.—are entering 1988 much leaner than in years past, the picture is still not that bright. Inflation in medical costs has been gaining momentum since mid-1987. Hospital occupancy rates, which had been decreasing during the past few years, have started to increase—although slowly. Ironically, rising occupancy will only worsen the problems this year, since government and private reimbursement health-care programs discourage admitting all but the sickest patients. And thanks to an aging population, AIDS and other factors, the number of such patients is starting to grow.

Although hospitals have been trying to pass their increased costs off on private insurers, it is expected that the private insurers will take stronger stands against such moves this year.

Even though hospitals have been trying to remedy many of their problems by renovating now-unused wings and offering new services—such as hospices—they still have an abundance of empty beds. According to *Business Week*, almost 40% of the nation's hospital beds are empty on an average day.

Health-maintenance organizations are hurting, too. Competition for customers has hiked recruiting expenses more than expected. Enrollment, which was running at 20% annually, has slowed to 15%.

The picture is not particularly pleasant for foodservice, either, particularly those in hospitals.

Food and beverage purchases in 1987 were $4.9 billion and are expected to decrease about 1% this year. Not only is this a result of fewer and sicker patients, but a drop in the number of employees being fed as well.

The picture for nursing homes is not quite so bleak—particularly in the long term. At the moment, they have a 96% occupancy rate. Not only is this a result of an aging population, but hospitals are discharging to nursing homes patients who are too sick to be cared for at home. Nursing home food purchases in 1987 were $1.9 billion; a modest 1% increase is forecast for 1988.

To be even more competitive, health-care administrators and foodservice departments have taken a variety of tacks. For instance, Beverly Enterprises has implemented a systemwide quality assurance program, a computer-assisted menu system.

National Heritage is emphasizing recruitment and meal presentation. The company is switching from plastic to china and now garnishes every entree.

ARA is test-marketing its "Light and Right" frozen meals, which complement the company's "Treat Yourself Right" nutritional-awareness program. The concept is targeted for hospital staffers, visitors and patients interested in purchasing convenient, nutritional meals. "We feel this concept fulfills the needs of busy doctors and nurses and recently discharged patients alike," says Carol Carlson, ARA Healthcare Nutritional Services' vice president of professional services. All 15 "Light and Right" meals are low in sodium, cholesterol and calories.

1 BEVERLY ENTERPRISES
Pasadena, Calif.
F&B purchases: $110 million
No. of units: 1,125
No. of beds: 120,000
No. of employees: 25,000

Popular menu items in 1987 included pot roast; roast beef; ham.

2 VETERAN'S ADMINISTRATION
Washington, D.C.
F&B purchases: $94.4 million
No. of meals served: 77.3 million
No. of units: 172
No. of beds: 76,213
No. of employees: 14,386
Labor costs: $296.5 million

3 NATIONAL MEDICAL ENTERPRISES INC.
Orange, Calif.
F&B purchases: $75 million
No. of meals served: 80 million
No. of units: 578
No. of employees: 7,000
Labor costs: $80 million

New menu items introduced in 1987 included more poultry and fish entrees and fewer beef and pork entrees.

4 UNITED HEALTH INC.
(Unicare Health/UHF Purchasing) Milwaukee
F&B purchases: $65 million
No. of meals served: 97 million (a 193% increase over 1986)
No. of units: 890
No. of employees: 9,000
Labor costs: $60 million

New menu items added in 1987 included lemon chicken; hacienda green beans; stuffed veal.

5 HILLHAVEN CORP.
(Subsidiary of NME)
Tacoma, Wash.
F&B purchases: $45 million to $50 million
No. of meals/day: 150,000
No. of units: 379 long-term care facilities
No. of beds: 47,357

New menu items added in 1987 included red bliss potatoes; French onion stew.

OTHER BIG PLAYERS
(large independents)

☐ **California Medical Facility**
Vacaville, Calif.
Annual food purchases: $7 million

☐ **Baptist Memorial Hospital**
Memphis, Tenn,
Annual food purchases: $5 million

☐ **Presbyterian Hospital**
New York, N.Y.
Annual food purchases: $5 million

☐ **University of Missouri Hospital and Clinics**
Columbia, Mo.
Annual food purchases: $4.5 million

Source: Report on Institutional Foodservice, Nov. 1987

"Popular entree selections in 1990 will include more creative diet items—more than just skinless chicken, for example."

—Raymond Zatl
TrettCo Inc.

At a Washington, D.C., hospital, a local restaurant chef helped recreate his facility's ambiance and food.

6 HUMANA INC.
Louisville, Ky.
F&B purchases: $38 million
No. of meals served: 2.2 million
No. of units (in U.S.): 83
No. of employees: 2,950

New menu items introduced in 1987 included made-to-order sandwiches; seafood salad on avocado; chicken salad with cashews; tuna salad; Oriental salad.

7 NUTRITION MANAGEMENT SERVICES
Kimberton, Pa.
F&B purchases: $30 million
No. of meals served: 15 million
No. of units: 65
Labor costs: 25 million
No. of employees: 1,000

New menu items added in 1987 included more pasta salads, hot desserts such as bread pudding and cobblers with toppings.

8 TRETTCO INC.
Farmington Hills, Mich.
F&B purchases: $23.3 million
No. of meals: $24.3 million
No. of units: 85
No. of beds: 10,805
No. of employees: 3,308 (supervised payroll)
Labor costs: $42 million

New menu items introduced in 1987 included "healthy heart" menu items

9 THE EVANGELICAL LUTHERAN GOOD SAMARITAN SOCIETY
Sioux Falls, S.D.
F&B purchases: $15.9 million
No. of meals served: 17.5 million (35 million when beverages and snacks are included)
No. of units: 195
No. of beds: 47,892
Labor costs: $20.3 million

10 MANOR CARE
Silver Spring, Md.
F&B purchases: $18.8 million*
No. of units: 139 nursing centers (121 owned; 16 leased; 2 managed); 1 acute-care general hospital
No. of beds: 18,527

Menus in facilities differ. Company now makes bran muffins and is testing using turkey in such items as lasagna.

*Report on Institutional Foodservice, December 1987

INSTITUTIONAL GIANTS

SCHOOLS

Generally, schools offer menu items similar to those sold in—and advertised by—fast-food restaurants.

With the ever-present threats of reductions in government funding and commodities and the uncertain economic climate, school foodservice directors continue to implement innovative marketing and promotional ventures to keep students on campus and eating meals at school. The school market is the third-largest of the segments in the institutional market, accounting for 21% of purchases, or about $6.6 billion. The amount is expected to increase about 1% this year.

How are school foodservice directors entertaining customers and encouraging them to eat school lunch and breakfast?

Generally, they continue to offer menu items that are similar to those offered by fast-food restaurants. "Let's be serious," says one director. "The chains are spending millions creating desire for their products. Our students have grown up on fast foods."

Dot VanEgmond-Pannell has found her Pizza/Read program to be effective. The foodservice department provided a pizza party for classes in the Fairfax County, Va., public schools when all students participated and met reading requirements.

Howard Briggs, foodservice director for the Detroit public schools, improved public relations with his students' parents by offering special ethnic days.

In Chicago, Cain Jones increased morning participation by offering a breakfast promotion.

In Los Angeles, foodservice director Beth Louargand received a lot of favor-

1 NEW YORK PUBLIC SCHOOLS
New York, N.Y.
F&B purchases: $88.4 million
No. of meals/year: 131.5 million (a 6.25% increase over 1986)
No. of employees: 10,000
Labor costs: $111.1 million

New menu items added in 1987 included croissant pizza; battered diced veggie sticks.

2 LOS ANGELES UNIFIED SCHOOL DISTRICT
Los Angeles, Calif.
F&B purchases: $61.6 million
No. of meals/year: 110 million
No. of employees: 3,000
Labor costs: $73 million

New menu items added in 1987 included turkey nuggets; egg rolls; breaded pork steak; beef empanada; breaded beef sticks.

3 CHICAGO BOARD OF EDUCATION
Chicago, Ill.
F&B purchases: $45.8 million
No. of meals/year: 69.2 million
No. of employees: 4,000
Labor costs: $37 million

New menu items added in 1987 included "cheese toasty", onion rings; vegetable seasoning blends; cracked wheat dinner rolls; salsa sauce.

4 HOUSTON PUBLIC SCHOOLS
Houston, Texas
F&B purchases: $23 million
No. of meals/year: 38,000 breakfast; 155,000 lunch/school day
Labor costs: $12 million
No. of employees: 1,639

New menu items introduced in 1987 included whole baked potatoes; fish nuggets, chicken breast strips.

5 SCHOOL DISTRICT OF PHILADELPHIA
Philadelphia, Pa.
F&B purchases: $15.3 million
No. of meals/year: 21.3 million
No. of employees: 2,046
Labor costs: $19.7 million

New menu items introduced in 1987 included turkey nuggets; beef nuggets; barbecued beef patty; lasagna; croissants; burger bundles.

> "Menu items popular in 1990 will be the ones popular now: burritos, pizza, chili cheese dogs, cheeseburgers, fiesta salads and nachos."
>
> —Marjorie Craft
> Dallas Independent School District

OTHER BIG PLAYERS

☐ **Denver Public Schools**
F&B purchases: $3.2 million
Number of meals served: 4.9 million lunch; 1.4 million breakfast

☐ **Minneapolis Public Schools**
F&B purchases: $2.7 million
Number of meals served: 3.4 million

☐ **New Haven, Conn. Public Schools**
F&B purchases: $1.8 million
Number of meals served: 3.1 million

☐ **San Francisco Public Schools**
F&B purchases: $3 million
Number of meals served/school day: 39,000

able press for the department when she arranged to have leftover food donated to needy people in the city.

A week-long citrus promotion in Atlanta schools increased the consumption of the citrus item offered each day, such as fresh oranges, orange juice and orange juice popsicles. Orange juice was also incorporated into recipes. The promotion was heralded prior to implementation by posters displayed in schools.

A "Powerhouse" sandwich offered in Baltimore schools was extremely popular. It was promoted by posters with a countdown: "Two days from now . . . "

Offering particularly attractive food has been the recent emphasis of Denver school foodservice. Foods are now all garnished, and extra care is taken in their presentation.

In Minneapolis, students have been attracted to foodservice with an offer of novelty items such as sponge animals that "grow" in water, which were packed with meals.

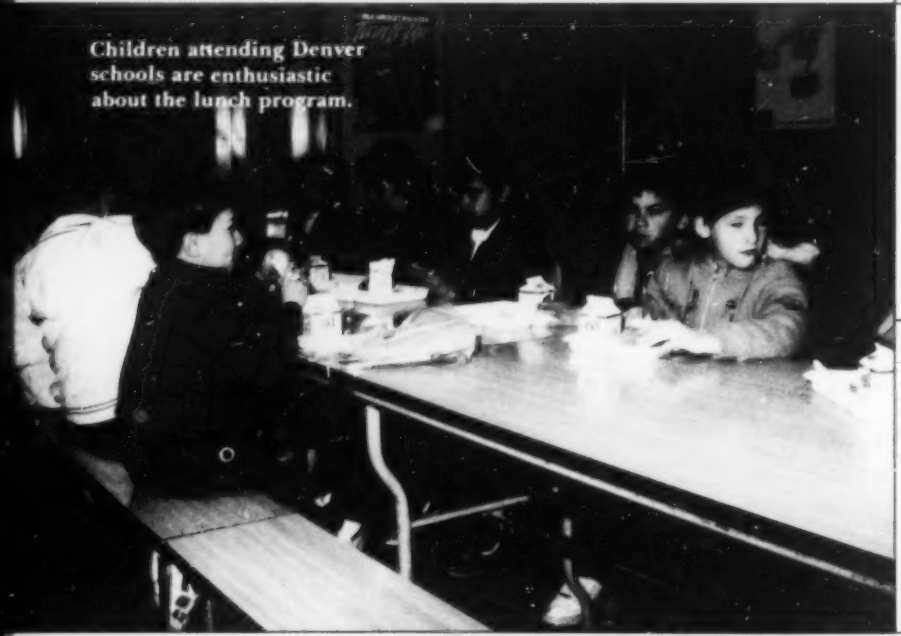
St. Louis foodservice has concentrated on increasing its visibility in the community, meeting with parent groups and local clergy to explain what the department is trying to do—and does do.

A build-your-own-sub sandwich has proven popular with students of the Boston public schools. The foodservice department has also held citrus, soup and milk promotions offered by commodity groups and food companies.

Introduction of gyros proved particularly popular in the Austin, Texas, schools.

Jane Wynn implemented salad bar promotions in all Broward County, Fla., secondary schools and introduced a breakfast program in all elementary schools.

Jane Boehrer has found taking over the vending and store operations and running them in cooperation with students has been very well-received by students and the foodservice department in San Diego. "By working together successfully, we solved the problem of 'turf' battles," Boehrer explains. She expects to increase the variety of snack foods available in the school stores, offering more specialty bars and other items that are not candy but substitutes that students find acceptable.



Children attending Denver schools are enthusiastic about the lunch program.

6 DADE COUNTY SCHOOL FOODSERVICE
Miami, Fla.
F&B purchases: $18.3 million
No. of meals/year: 30 million
Number of employees: 2,500
Labor costs: $21.4 million

New menu items introduced in 1987 included black beans/rice, French toast sticks; fried mozzarella.

7 DALLAS INDEPENDENT SCHOOL DISTRICT
Dallas, Texas
F&B purchases: $14 million
No. of meals/year: 18.3 million
No. of employees: 1,519
Labor costs: $10.9 million

New menu items added in 1987 included onion rings; sweet potato nuggets; beef and chicken fajitas; ham patty.

8 DETROIT PUBLIC SCHOOLS
Detroit, Mich.
F&B purchases: $11.6 million
No. of meals served/school day: 83,000
No. of employees: 2,100
Labor costs: $7.8 million

New menu items added in 1987 included folded pizza; Mexican chili dog; cheese croissants.

9 FAIRFAX COUNTY PUBLIC SCHOOL FOODSERVICES
Springfield, Va.
F&B purchases: $9.5 million
No. of meals/year: 12.6 million
No. of employees: 1,075
Labor costs: $10.2 million

New menu items added in 1987 included nachos with cheese/chili; fish nuggets; fruit juice sherbet; cherry turnover.

10 THE SCHOOL BOARD OF BROWARD COUNTY
Fort Lauderdale, Fla.
F&B purchases: $8.1 million (plus $2.4 million in donated commodities)
No. of meals/year: 14.6 million
No. of employees: 1,000
Labor costs: $9.7 million

New menu items added in 1987 included fish nuggets; Jamaican pies; egg rolls.

INSTITUTIONAL GIANTS

GOVERNMENT & MILITARY

Military personnel want more variety. They are also becoming more interested in improving their health.

With an increasingly uncertain economic outlook for the nation and layoffs in many industries rampant, employment by the government is continuing to be an optimal career choice for many.

As do their counterparts in other institutions, military personnel want more variety. They are also becoming more interested in improving their physical health. Their superiors are in favor of the idea. "We're not just looking for bodies," says a retired Marine colonel. "When we say, 'a few good men,' we're not kidding. We want Marines who are battle-ready. If better nutrition makes our military more fit, then I'm all for it. It's bad enough that the general population is getting flabby. The military should not have that option. The commandant of the Marines has said he is tired of seeing Marines jogging in color-coordinated outfits. He thinks they should be running the beaches of California in battle gear. I agree."

Military food and beverage purchases for 1987 totaled $1.4 billion. The number is expected to increase about 0.5% in 1988.

The Air Force will continue the crusade led by Surgeon General Everett Koop to provide items lower in cholesterol and sodium to reduce incidence of heart disease. Starred items on the Sensible Limited Intake Menu (SLIM) will be prepared with less salt, gravies and sauces.

Army installations are following suit, offering low-calorie salad dressings, for

continued on page 62

1 NAVY FOODSERVICE SYSTEMS OFFICE
Washington, D.C.
F&B purchases: $289.3 million
No. of rations: 67.7 million
No. of units: 684 general messes

New menu items added in 1987 included Italian pasta salad; fruit bars; chocolate mousse pie; sweet-and-sour chicken; turkey croissant with chutney sauce.

2 U.S. ARMY TROOP SUPPORT AGENCY
Fort Lee, Va.
Total food purchases: $249.5 million
No. of meals served: 201.1 million
No. of dining facilities: 1,074
No. of staff: 23,866

New menu items added in 1987 included stuffed cabbage rolls.

3 U.S. AIR FORCE
Tyndall Air Force Base, Fla.
F&B purchases: $117.7 million
No. of meals served: 95.1 million

New menu items added in 1987 included baked potato with variety toppings; grilled gourmet burger; grilled hamburger on whole wheat buns; egg and sausage biscuit.

4 U.S. MARINE CORP MILITARY CLUBS
Washington, D.C.
F&B purchases: $60.9 million
No. of units: 147
No. of employees: 1,582 (full-time and part-time)
Labor costs: $17.9 million

New menu items introduced in 1987 included top-your-own variety burgers and deli sandwiches at sandwich bars.

5 U.S. NAVY CLUB SYSTEM
Washington, D.C.
F&B purchases: $60.2 million
No. of units: 261
No. of employees: 10,000
Labor costs: $89.1 million

New menu items introduced in 1987 included Italian pasta; fajitas; Cajun and Oriental ethnic entrees; gourmet hamburgers; "healthful" cuisine.

"In 1990, I expect we'll be serving more seafood, fish and veal and less red meat."

—Col. Charles E. Anderson
Allied Clubs Branch, NATO, AFSOUTH

The military is upgrading facilities.

INSTITUTIONAL GIANTS

GOVERNMENT & MILITARY

Although there are many chain restaurants on bases, their initial appeal seems to have worn thin.

6 **NAVY RESALE AND SERVICES SUPPORT OFFICE (NAVRESSO)**
Staten Island, N.Y.
F&B purchases: $45.5 million
No. of transactions: 34 million
No. of units: 535
No. of employees: 3,500
Labor costs: $26 million

New menu items added in 1987 included French bakery goods.

7 **VETERANS CANTEEN SERVICE**
Washington, D.C.
F&B purchases: $22.2 million
No. of units: 172
Total labor costs: $22.6 million
No. of employees (full-time equivalent) 1,915

New menu items added in 1987 included pasta entrees; soup and sandwich specials; breakfast specials; "healthful" selections.

8 **OHIO DEPARTMENT OF REHABILITATION & CORRECTIONS**
Columbus, Ohio
F&B purchases: $19.9 million
No. of meals served: 23.9 million
No. of units: 17
No. of employees: 255 civilians
Labor costs: $4.7 million

Most popular menu items in 1987 included ham; chicken.

9 **MEN'S CENTRAL JAIL**
Los Angeles, Calif.
F&B purchases: $19 million
No. of meals served: 24 million (a 20% increase over 1986)
No. of units: 8 kitchens; 1 bakery
No. of employees: 152

New menu items added in 1987 to inmate menus included pizza; American beef casserole.

10 **NORTH CAROLINA DEPARTMENT OF CORRECTIONS**
Raleigh, N.C.
F&B purchases: $13 million
No. of meals served: 19.7 million
No. of units: 87
No. of employees: 1,200
Labor costs: $23 million

New menu items introduced in 1987 included stuffed potatoes; bacon burger; crab cakes.

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instance, to reduce fat intake.

The Air Force also recently introduced breakfast bars, using existing salad bar equipment.

Burgers were the most popular menu item in 1987, according to Flo Dunn of the U.S. Army Troop Support Agency in Fort Lee, Va. Troops were also consuming chili, chicken, lasagna, pizza, shrimp, roast beef, spaghetti, barbecued spare ribs and steak at a great rate.

In the Navy, Capt. John Anderson of the Foodservice Systems Office says the most popular menu items in 1987 included the ubiquitous hamburger plus chicken, shrimp and Oriental entrees.

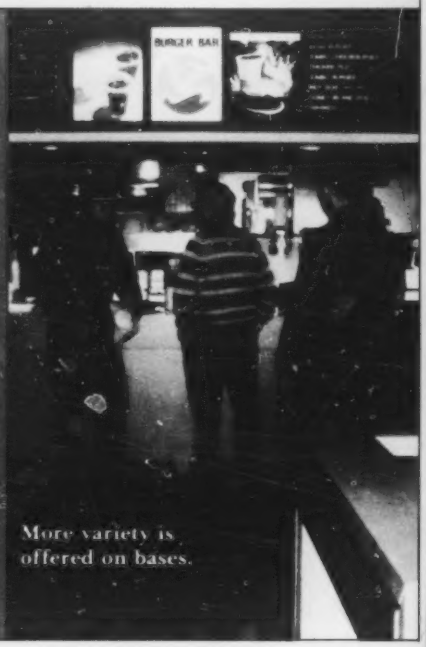
At the Allied Clubs Branch, NATO, AFSOUTH, the most popular entrees included veal Oscar, prime rib and steak.

Those in charge of the nation's prisons are also trying to upgrade the quality and to offer more options. In part, the changes have resulted from prisoner demands and resulting lawsuits. In other cases, the motivation is not mandated but still necessary.

"If you happen to serve lukewarm instead of hot soup," said a prison dietitian, "it's real easy to end up with a riot on your hands."

With the increase in drug use—and resulting arrests—many more prisons are filled to capacity. "Other" institutional foodservice purchases, which include prisons, is about $1 billion and expected to increase 0.5% during this year.

> "I expect our popular menu items in 1990 will be burgers, chili, chicken, lasagna, pizza, shrimp, roast beef, spaghetti, ribs."
>
> —Flo Dunn
> U.S. Army Troop Support Agency



More variety is offered on bases.

INSTITUTIONAL GIANTS

COLLEGES

Today, residence halls are much more homey. Many have suites and dining areas that are very attractive.

Not until the early 1960s did college administrators start to think of residence halls as more than dormitories—with bathrooms located down the halls and "no-frills" foodservice. "We kind of had the attitude of 'take it or leave it,'" explains one college foodservice director.

Today, college residence halls are much more homey. Many have suites and dining facilities that are attractively decorated. "We really didn't have a choice," says one college director. "Kids started to demand options. We had to offer them."

"Options" have meant everything from a variety of board plans and point systems to food courts and elegant restaurants. Many colleges also have become franchisees, as well. There's a Carl's Jr. at the University of Southern California, a Burger King at California State-Sacramento, and the union at Michigan State University boasts Häagen-Dazs ice cream, a Burger King, Little Caesars pizza and Hobies (sub and soup). Students at the University of Pennsylvania can remain on campus and still eat in Wendy's and Skolniks. A soon-to-open food court will house Pat's Steaks, Hillary's Gourmet Ice Cream, Domino's pizza and Levi's Franks.

Many colleges have also seen the economic feasibility of opening convenience stores. "The kids were going off campus to purchase frozen pizza, snacks, batteries for radios, sodas and ice cream," says one university foodservice director. "We figured it made

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1 MICHIGAN STATE UNIVERSITY

East Lansing, Mich.
F&B purchases: $13 million
No. of meals/year: 8 million
No. of employees: 950 full-time; 3,600 part-time students
Labor costs: $7.1 million

New menu items introduced in 1987 included three-cheese pita; stromboli; seafood strudle; walnut chicken stir-fry.

2 PENN STATE UNIVERSITY

University Park, Pa.
F&B purchases: $10.4 million
No. of meals/year: 6 million
No. of employees: 750
Labor costs: $9 million

New menu items introduced in 1987 included stir-fry; "chewy" cookies; omelets; croissant sandwiches; a variety of food bars.

3 BRIGHAM YOUNG UNIVERSITY

Provo, Utah
F&B purchases: $8.1 million
No. of meals/day (excluding Sundays): 30,000
No. of employees: 114 full-time; 1,200-1,400 students
Labor costs: $5.1 million

New menu items introduced in 1987 included beef and Cheddar sandwich.

4 RUTGERS UNIVERSITY

New Brunswick, N.J.
F&B purchases: $6.6 million
No. of meals/year: on contract: 3 million; cash sales: $1 million; catering: $700,000
No. of employees: 400 full-time; 300 part-time
Labor costs: $5.8 million

New menu items introduced in 1987 included Cajun catfish; individual pizzas; vegetarian chili.

5 UNIVERSITY OF PENNSYLVANIA

Philadelphia, Pa.
F&B purchases: $6.1 million
No. of meals/year: 2.6 million
No. of employees (full-time equivalent): 803
Labor costs: $7.8 million

New menu items introduced in 1987 included salmon soup; brown rice; linguine bouillabaisse.

University of Iowa menu selections for students.

INSTITUTIONAL GIANTS

COLLEGES

Many college foodservice departments have seen the economic feasibility of opening convenience stores.

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much more sense for us to sell them the products. We also have a chance to garner more of commuting students' dollars by offering these services, too."

Many colleges and universities are no longer just providing their baked goods to their residence hall cafeterias. They are opening retail operations that offer students (and, discreetly, the public) items such as on-campus-baked cookies, cakes, cinnamon rolls and other confections.

What else are college and university foodservice directors doing to keep those elusive foodservice dollars on campus?

At the University of Minnesota, the foodservice department recently implemented a grab-a-bag lunch program and an outdoor brat stand.

A series of sesquicentennial Michigan birthday parties were held at Michigan State University last year. Michigan food products were served while Michigan craftspeople, such as potters, demonstrated their skills.

Catering revenue dollars were up 50% last year at Penn State University.

A new gourmet coffee shop was added to an existing retail bakery outlet at the University of Tennessee. Promotions included drawings for free prizes, free samples of gourmet coffee and the establishment of a UT coffee club. Sales increased 280%.

Specialty dinners at the student center of North Carolina State University (promoted through student newspaper ads and flyers distributed to residence halls) increased sales 20%. R&I

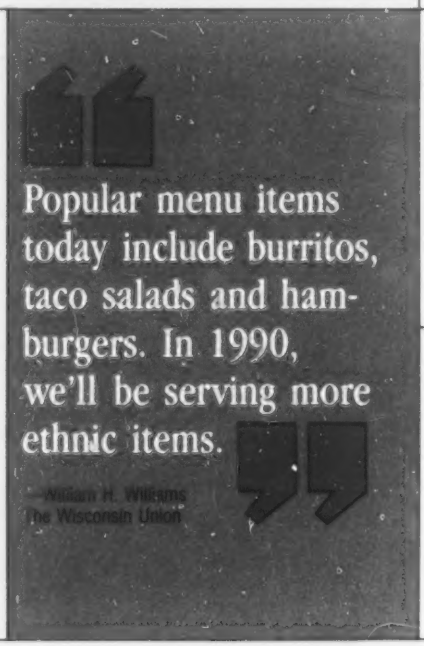
(Research by Nancy Schultz)

OTHER BIG PLAYERS

☐ **North Carolina State University**
Raleigh, N.C.
F&B purchases: $2.7 million
Number of meals served/week: 64,000

☐ **Texas A&M University**
College Station, Texas
F&B purchases: $4.6 million
Number of meals served: 7.7 million

☐ **University of Iowa**
Iowa City, Iowa
F&B purchases: $3 million
Number of meals served: 2.5 million


Popular menu items today include burritos, taco salads and hamburgers. In 1990, we'll be serving more ethnic items.
—William H. Williams
The Wisconsin Union

6 **CORNELL UNIVERSITY**
Ithaca, N.Y.
F&B purchases: $6.8 million
No. of meals/year: 5.4 million
No. of employees: management, 40; professional, 342; students, 650

New menu items introduced in 1987 included soft-serve ice cream; tempura-battered foods for Chinese takeout; New York street-style hot dogs.

7 **UNIVERSITY OF ILLINOIS**
Champaign, Ill.
F&B purchases: $6 million
No. of meals/year: 5.4 million
No. of employees: 351 full-time; 1,300 part-time students
Labor costs: $5 million

New menu items introduced in 1987 included cheese-and-bread and soup-and-bread bars (as entrees); seafood bars; tapas bars; pork lo mein.

8 **UNIVERSITY OF NOTRE DAME**
Notre Dame, Ind.
F&B purchases: $5.6 million
No. of meals/year: 7.1 million
No. of employees: 1,000 (including students)
Labor costs: $4.6 million

New menu items introduced in 1987 included Romano chicken; pasta bar selections; Chinese hero sandwich.

9 **UNIVERSITY OF MICHIGAN**
Ann Arbor, Mich.
F&B purchases: $5.3 million
No. of meals/year: 2.9 million
No. of employees: 192 full-time
Labor costs: $5.6 million

New menu items added in 1987 included Dakota chicken; chocolate chunk cookies; catfish; Black Forest cheesecake; Mexican pizza.

10 **UNIVERSITY OF MINNESOTA**
Minneapolis, Minn.
F&B purchases: $5.2 million
Number of transactions in 1987: 6.6 million
No. of employees: 500
Labor costs: $5.8 million

New menu items introduced in 1987 included jumbo muffins; gourmet cookies; Kentucky hot brown salads; Oriental dishes; fruit plates.

MENUS

■ R&I DATA

FOOD COST INDEX: NEGATIVE INDICATORS ARE A POSITIVE SIGN FOR OPERATORS

The market-basket total for the end of April is $95.76. This is down from the $105.90 market-basket total for the beginning of the month. Chicken prices are higher, particularly in the South, where operators are paying $1.52 a pound. Lettuce prices are showing signs of recovery. The cost for breaded fish portions shows an increase of 89% from the beginning of the month. This large percentage increase is due in part to a low cost of $1.13 reported at the beginning of the month.

		% change	
	4/29/88	4/1/88	4/87
Hamburger (lb. 85% lean)	$1.42	8	15
Chicken (lb. cut for frying)	1.02	36	28
N.Y. strip steak (lb./avg.)	3.27	9	−10
Bread (Pullman loaf)	.76	1	−8
Lettuce (iceberg/head)	.75	−29	39
French fries (30 lb.)	10.61	−3	0
Tomatoes (lb.)	.53	−16	4
Milk (gal.)	1.95	19	11
Eggs (doz.)	.66	0	−4
Peaches (case/#10)	14.27	−21	−19
Peas (case/#10)	9.52	−14	−25
Frozen beans (30 lb.)	12.73	−15	−17
Ice cream (vanilla/gal.)	3.16	−1	−7
Butter (lb.)	1.60	5	−5
Cheddar cheese (lb.)	1.56	−7	−1
Sugar (100 lb.)	27.65	−10	−2
Coffee (lb.)	2.16	−6	−14
Breaded fish portions (lb.)	2.14	89	23

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■ FOOD PRICE UPDATE

Soy Product Introductions Soar in the '80s

Tofu, tempeh, soy milk, and soy ice creams are most popular entries

Soy is moving rapidly into the mainstream of food products. Today's trend toward lighter eating, a willingness to try new foods, along with a better-educated consumer, have helped soy food introductions to increase more than 653% since 1977, according to The Soyfoods Center.

Made from soybeans, America's second largest farm crop, soy food products contain no cholesterol or lactose, and are usually low in fat and calories. They can take a multitude of forms, from burgers and hot dogs to ice cream, milk, cheese, yogurt and salad dressings.

During the 1950s, an average of 11 new soy food products were launched each year in the United States. This number increased to 16 during the 1960s and 26 during the period of 1970-1974. Most of these new introductions were based on modern, high-tech soy protein products, such as soy protein isolates and concentrates, or textured soy flour.

Then, in the late 1970s, the number of new product introductions began to rise rapidly. It reached 78 in 1976, 162 in 1979, 224 in 1982, 296 in 1985 and an all-time high of 330 in 1987.

Most of the growth in new products since the late 1970s has come from traditional, low-tech products such as tofu, tempeh (which has a texture and flavor like Southern-fried chicken), soy milk, miso (a savory high-protein seasoning), soy sauce and soy nuts, plus modern dairy-like soy foods such as soy ice creams, yogurts and cheeses.

In the United States, tofu was a major ingredient in 41% of the new products, followed by soy milk (9%), tempeh (9%), soy ice creams (8%) and isolated soy proteins (8%).

Leading product categories were: basic soy foods (21%), dairy-like products (17%), meat-like products (14%), entrees (11%), beverages (6%), ice creams (5%), and dressings, dips and spreads (4%).

In other news. The USDA is now reviewing consumer comments on its proposal that leaner beef, now graded Good, be renamed Select to give it a classier image. Public Voice and other activist groups support renaming this grade. The Good tag has been with this leaner, usually less tender beef for years. ***—Kathleen Marshall***

The spring thaw has unfrozen the price of many fruits and vegetables.

ACTION EXPRESS

MAGAZINE DIVISION STAFF

Terrence McDermott, President; David S. Wexler, Vice President Foodservice Group; Thomas J. Dellamaria, Vice President Production and Manufacturing.

BUSINESS STAFF

Barry H. Reese, Publisher; Jane Young Wallace, Associate Publisher; Steven D. Mayer, Director of Marketing; Catherine Erickson, Associate Director of Marketing; Kate Leach, Assistant to Sales/Marketing Director; M.R. Robinson, Vice President Foodservice Research; Karen Hallberg, Foodservice Research Director; Ed Christ, Circulation Director; Denise Stolton, Circulation Manager.

BUSINESS OFFICES

Mark A. Strauss, National Sales Director. **Midwest:** Rose Deneen, National Sales Coordinator; Spencer B. Isola, Regional Manager; John W. Maisel, Regional Manager; Marjorie S. Maca, District Manager; Susan Kallas, Sales Services Manager; Patricia McGowan, Recruitment/Classified Advertising Manager, Cahners Plaza, 1350 E. Touhy Ave., P.O. Box 5080, Des Plaines, IL 60017-5060. Phone: 312/635-8800. **East Coast:** Robert Fisk, Regional Manager; William Lazar, Regional Manager, 8 Stamford Forum, P.O. Box 10277, Stamford, CT 06904-2277. Phone: 203/328-2547. Michael Cardello, Regional Manager and National Sales Manager/Beverage Alcohol, 249 W. 17th St., New York, NY, 10011-5301. Phone: 212/463-6480. **Central Area:** Jerry Stiegler, Regional Manager, 1621 Euclid Ave., Cleveland, OH 44115-2186. Phone: 216/696-1800. **Southeast:** Thomas McElhinny, Regional Manager; Claire Gillen, District Manager; Suite 395, 6520 Powers Ferry Rd., Atlanta, GA 30339-2911. Phone: 404/955-6500. **West Coast:** Stephen Kosloff, Regional Manager; Rebecca Roberts, Regional Manager, Suite 236, 12233 W. Olympic Blvd., Los Angeles, CA 90064-1068. Phone: 213/826-5818. **Southwest:** Thomas McElhinny, Regional Manager, 12127 Carriage Hill Dr., Houston, TX 77077-2508. Phone: 713/497-1095. Michael Cardello, Regional Manager, Suite 515, 13740 Midway Road, Dallas, TX 75244-4314. Phone: 214/980-0318. **Japan:** Kaoru Hara, Dynaco International Inc., Suite 1003—Sun-Palace Shinjuku, 8-12-1 Nishishinjuku Shinjuku-ku, Tokyo 160, Japan. Phone: 03/366-8301.

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